



IBM Software Group

DB2 Document Manager

DB2 Information Management Software



Agenda

- ◆ DB2 Document Manager
 - ◆ Integration into ECM Portfolio
 - ◆ Business Scenarios
 - ◆ Functional Overview
 - ◆ Architectural Overview
 - ◆ Demo



Enterprise Content Management Applications

WebSphere Portal, Other Portals or Custom Applications



API – IBM OOAPI's

IBM CONTENT MANAGER

Basic functions

Security / User Management
Workflow

Infrastructure

Database / Filesystem / TSM

What raises the need for a DMS solution ?

- ◆ Extensive, uncontrolled and redundant use of file space (local and server based)
- ◆ Controlled approval processes for document creation with flexible access control and voting mechanism
- ◆ Automated publishing processes for complex and compound documents including compilation, transformation and delivery
- ◆ Access to archiving and storage solutions from within the application that is used to create the information.
- ◆ Implementing interactive E-Mail archiving functions without changing the mail database template.



Why customers need DB2 Document Manager

- ◆ Information objects are becoming more granular and their reuse and control is becoming more critically important - **RELATIONSHIPS**
- ◆ Documents need to be under control from the moment of creation until their final disposition - **LIFECYCLE**
- ◆ Users of document management systems need to enjoy the interface and also be able to work from within their familiar desktop applications – **APPLICATION INTEGRATION**
- ◆ No matter how much information is stored in a repository, none of it is of any use unless it can be easily found when needed – **EASE OF USE**
- ◆ Useful document management systems are ones where the users ask for change and the successful ones are those where the changes can be made rapidly – **EASE OF**



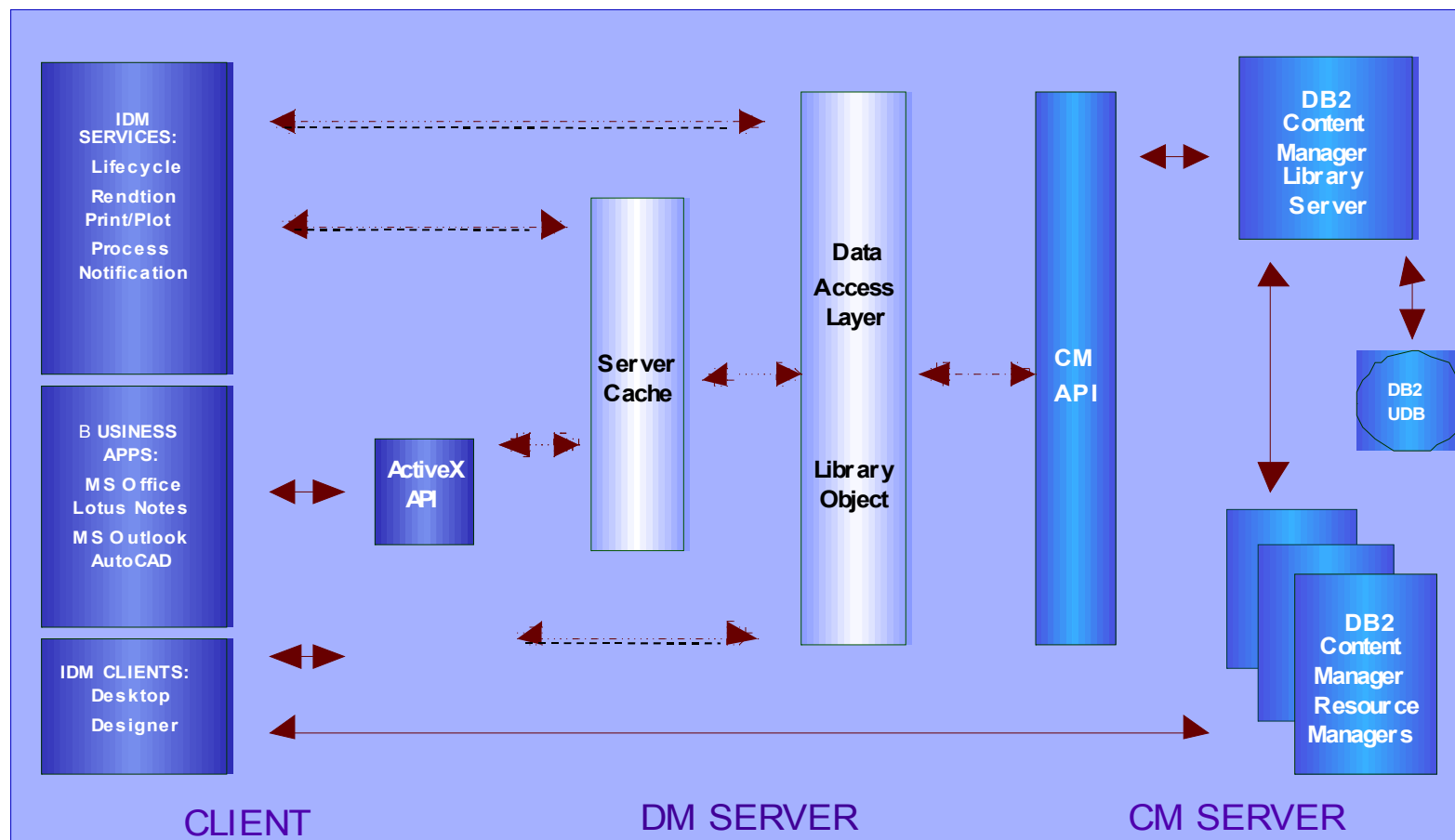
DB2 Document Manager – Server Functions

Server based functions:

- ◆ Notification – Email and Instant Messaging
- ◆ Rendition – creates Renditions in other data formats
- ◆ Print/Plot – Cost-effective output management
- ◆ Projectworkplace – central workplace management
- ◆ Processcontrol – supports flexible business processes
- ◆ Mass import – Imports existing Office-Documents



DB2 Document Manager with DB2 Content Manager



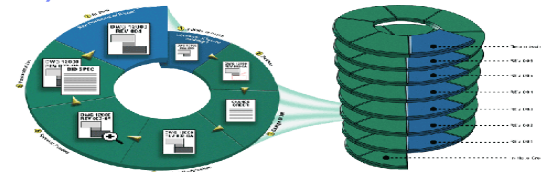
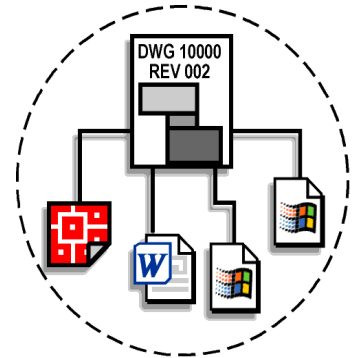
Demo



DB2 Document Manager – key functions

Compound document management

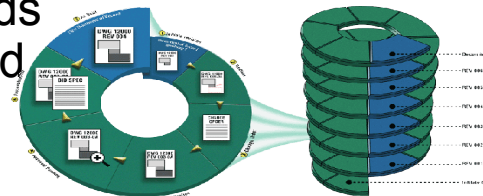
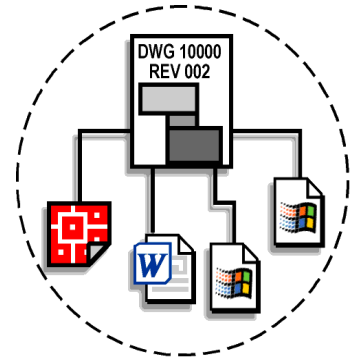
- One object and another – **PEER to PEER**
 - An editable report (**PEER**) and its PDF rendition (**PEER**)
 - An engineering drawing (**PEER**) and its TIFF rendition (**PEER**)
- One object and another – **PARENT/CHILD**
 - A Word document (**PARENT**) with an OLE reference to an Excel Chart (**CHILD**)
 - An Email (**PARENT**) with an attachment (**CHILD**)
 - A CAD drawing (**PARENT**) with its reference (**CHILD**)
 - The financial section (**PEER**) of an annual report and the executive summary of the same report (**PEER**)



DB2 Document Manager – key functions (cont)

Lifecycle management (states)

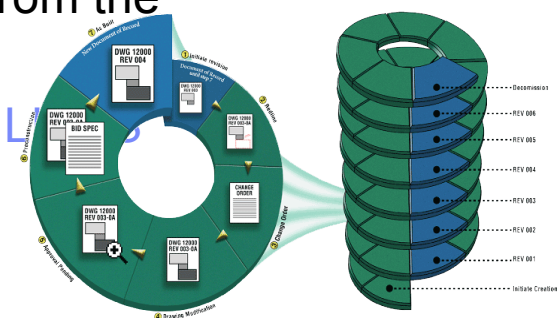
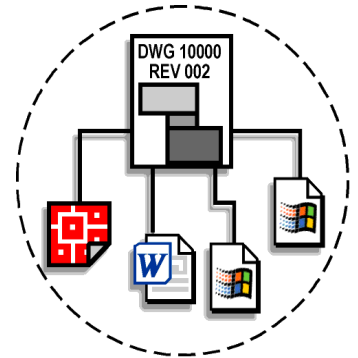
- during its life, the security control on the object may change. For example, the **ROLE** of the creator, may not have **RIGHTS** to change the object once it has been submitted for approval
- When an object progresses, a **NOTIFICATION** consisting of an email or Sametime message may need to be sent to alert a user or group
- At some point (or at many points) in its life, a **RENDITION** of an object may need to be created. For example, a Word report with Excel charts may be rendered into a PDF for the consuming audience.
- Some events of an object's life may be monitored by the **PROCESS** manager. For instance, if an object remains in “Awaiting Approval” for more than 5 days, an email needs to be sent to the “Approvers” reminding them of the need for their action.



DB2 Document Manager – key functions (cont)

Application Integration

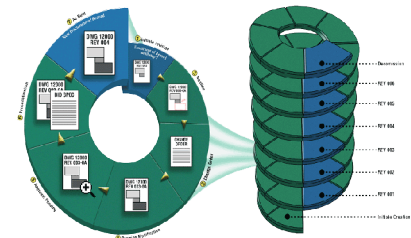
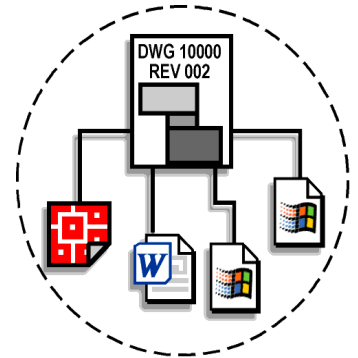
- Users want to “just do their work” not have to “go to another system” to store and locate their information.
- Application integration is **BEYOND** the **ODMA** commands of “Check-in” and “Check-out”. It allows for **ANY COMMAND** to be accessed from the user application. For instance a user can:
 - ◆ view the Lifecycle of an opened document
 - ◆ approve a document
 - ◆ declare the document a “Document of Record” in Records Manager
- Complete bi-directional **PROPERTY EXCHANGE** from the application and the repository meta-data.
- System parsing of the document to **DETECT NEW L** and automatically **BUILDS PARENT/CHILD RELATIONSHIPS**.



DB2 Document Manager – key functions (cont)

Ease of Use

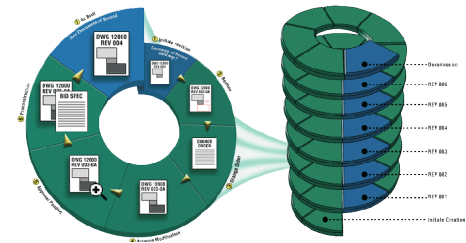
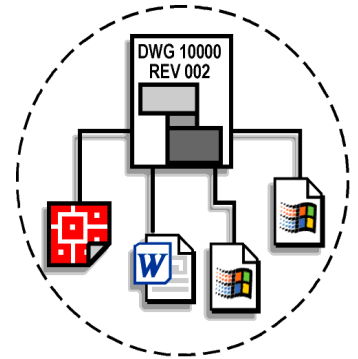
- **WEB-BASED** Desktop
- Entire desktop interface **ADAPTS** to the individual **USER** and their particular **ROLE**
 - ◆ As a user changes roles, the commands and features available dynamically change
 - ◆ A user is only presented with the files, folders, and commands that are pertinent to their role and job function
- **DRAG AND DROP** from Windows Explorer to the desktop
- Extensive **FOLDER** structure
- **SIMPLE** and **COMPLEX SEARCH** features
- Attach searches to folders to create **SMART FOLDERS** which perform the query when the folder is opened, resulting in dynamic contents



DB2 Document Manager – key functions (cont)

Ease of Deployment

- Installation to the client is as easy as providing a **URL**
- Through **CACHE** services, updates are done once on the server
- All system configuration is done through a **POINT-AND-CLICK, DRAG-AND-DROP ADMINISTRATION** tool
 - ◆ **NO PROGRAMMING** is required
 - ◆ Instantaneous affectivity allows for **RAPID PROTOTYPING** of new designs and **QUICK SIGN-OFF** by the user community
- **CONFIGURATION** is usually measured in **DAYS** rather than weeks
- Tools are provided to assist in **BULK LOADING** of data

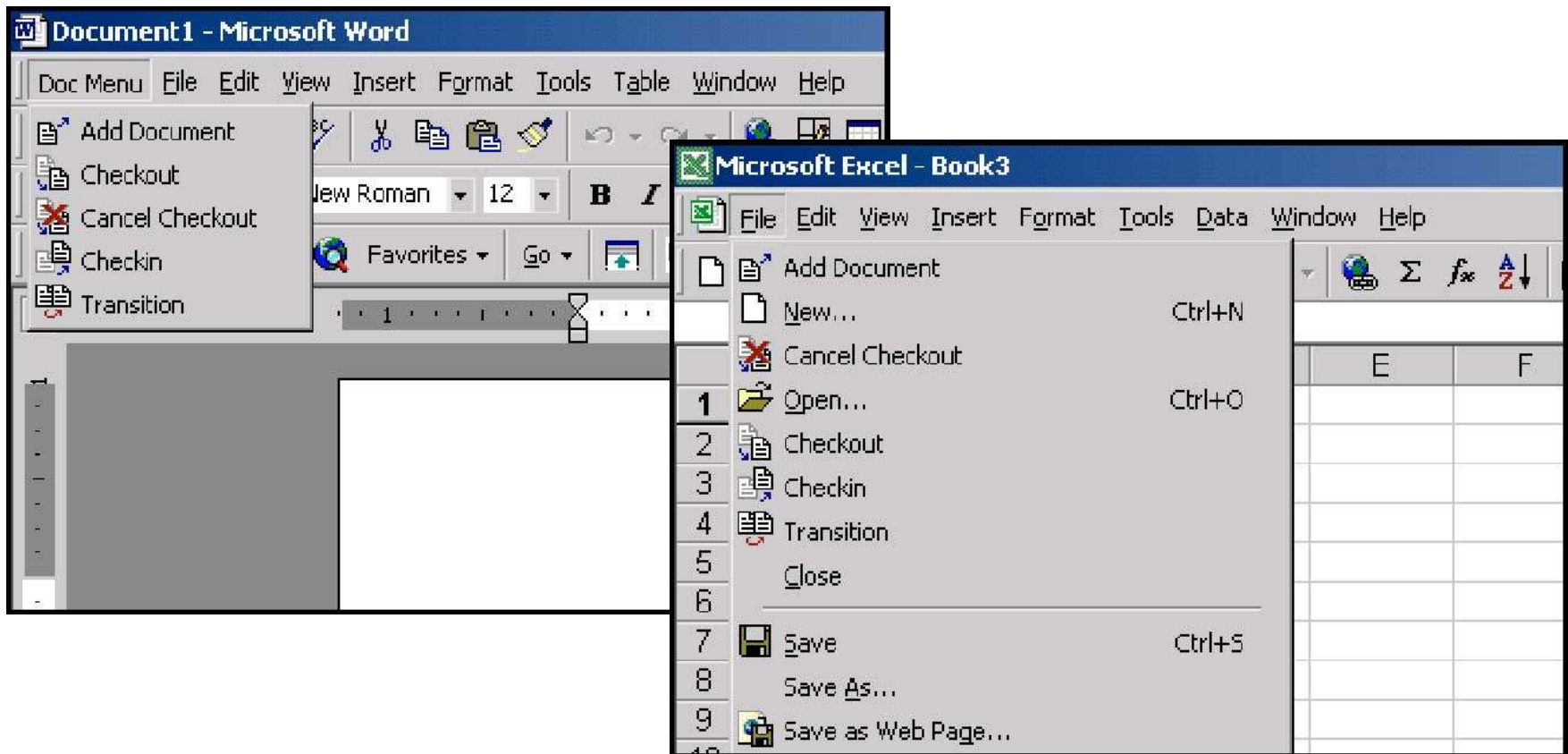


Screenshots



DB2 Document Manager

*Office Integration
nahezu transparent*



DB2 Document Manager

Web-basierter Arbeitsplatz

G5 Desktop - Microsoft Internet Explorer

Address: C:\Program Files\Green Pasture Software\G5\default.htm

Library Document Folder Configure Tools

Add Document Add From Library Template Checkout-Launch Checkin Cancel Checkout Search Power Search Folders Folder Admin Doc Number Generation Document Lifecycle

Badger Content Manager

- "Admin" Home
- Archives
- Contracts
- Corporate Information
- Corporate Planning
 - Draft
 - Ready for Review
 - Released Drawings
- Expenses
- Human Resources
- Marketing
- Markups
- P&ID's

View: Corporate Return: 200 Displayed: 15 Selected: 0

Info	Title	Project Name	Approved by	Shee
✓	Annual Report	Corp Planning	John Simpson	
	Standard Disclaimer	Corp Planning	T.J. Walker	
	1st Quarter Earnings	Corp Finance	Barry Monroe	
	Expenses	Corp Finance	Margaret Brower	1/15
	Year End Departmental Statements	Corp Finance	Calvin Daniels	
	Company Accounts	Corp Finance	Charity Miller	
	Revenue - Projected vs Actual	Corp Planning	Sam uel Usher	
	Profit and Loss Statement	Corp Finance	Denny Benton	
	3 year earnings chart	Corp Finance	Harry Green	
	Corporate HQ Photo	Public Relations	Paul McMillen	
	General Contractor Consulting Agreement	Legal	Andrew Nevell	
	General Contractor Non Disclosure Agreement	Legal	Barry Monroe	
	Grant	Legal	Calvin Daniels	
	Auditor's Report	Corp Finance	T.J. Walker	
	Sub for US Inc Consulting Agreement	Legal	Sam uel Usher	

From: Finance... Message: Please review the totals

Library: "Badger Content Manager" User: "Calvin Daniels" Group: "Administrators"

Refresh User Preferences Document Lifecycle CpDoc Manager Update Library Document Build Hybrid Generate Report Mail Modify Power Modify Preview

Done My Computer